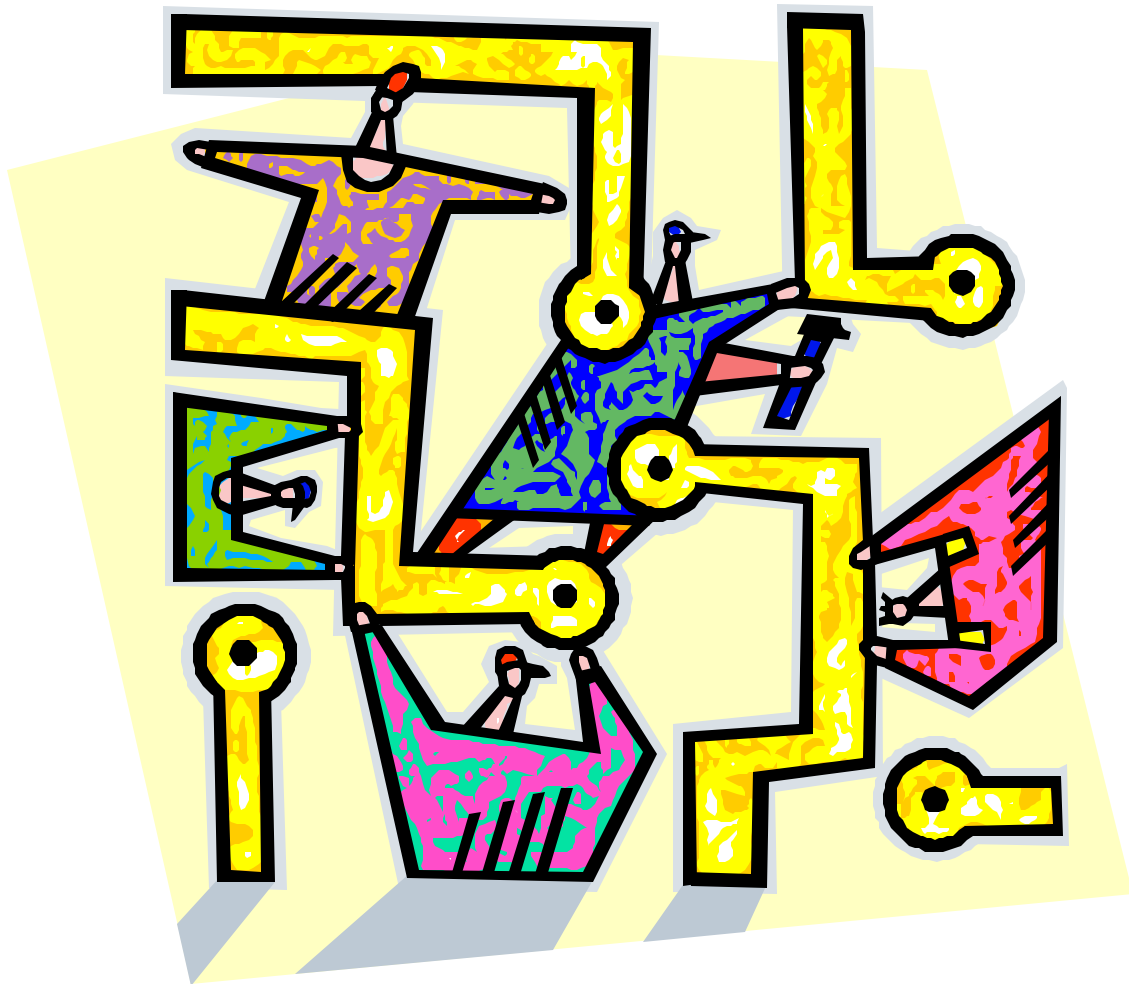


Project Management Framework

Investment Plan Template



Investment Plan Template

Investment Approval Request

(Complete an investment approval request form.)

Purpose

Business Problem to Be Solved

(Describe the purpose of the business problem to be solved or opportunity to be gained.)

Background Information and Objectives

(Include a description of background information and objectives.)

Business Justification

Relationship to Agency IT Portfolio and Business Plan

(Provide an explanation of how the investment relates to the agency's IT portfolio and how it supports the agency business plan.)

Relationship to State's Technology Infrastructure

(Provide an explanation of the investment as it relates to the state's technology infrastructure.)

Alternatives Considered

(Describe the alternatives considered.)

Alternative Selected

(Describe the rationale for the selection of the chosen alternative.)

Risk**Risk Assessment**

(Using the Severity and Risk Matrices, identify the severity, risk and the resulting approval level of the investment. Identify risk mitigation plans for high level risks.)

Quality Assurance

(Describe the QA processes to be used to manage the investment process.)

Conformance to Technical Policies and Standards

(Explain how the investment conforms to the technical policies and standards of the ISB, DIS, and your agency.)

Costs and Benefits**Agency IT Resources to Be Used**

(Describe existing agency IT resources to be used, including internal agency staff.)

IT Resources to Be Acquired

(Describe IT resource(s) to be acquired, including internal agency resources.)

Cost Benefit Analysis

(Provide a copy of the Cost-Benefit Analysis (CBA) from the feasibility study, if a feasibility study is required. If not required, provide a summary of the costs and benefits for each of the feasible alternatives.)

Investment and Lifecycle Costs

(For the selected alternative, provide an estimated first-year investment cost, as well as system life cycle costs for five years or the expected life of the resource, whichever is shorter.)

Financing and Refurbishment Plan

(If the investment will be leased, explain the plan for financing and refurbishment.)

Acquisition Process/Approach**Acquisition Method**

(Describe the acquisition method to be used, including the rationale for its selection, and a list of companies to receive the solicitation document, if known.)

Acquisition and Implementation Schedules

(Provide the acquisition and investment implementation schedule.)

Investment Approval Request Form

This space For DIS/MOSTD use only:

Investment Approval Request
For Information Technology Resources

Department of Information Services
Management & Oversight of
Strategic Technologies Division

360/902-2975
MS: 42445

1	Agency: _____ Division: _____ Contact: _____ Phone No. and E-Mail: _____		
2	Description of Resources:		Resource to be Acquired Type of Resource: <input type="checkbox"/> Equipment <input type="checkbox"/> Software <input type="checkbox"/> Purchased Services <input type="checkbox"/> Personal Services Telecommunications: <input type="checkbox"/> Voice <input type="checkbox"/> Data <input type="checkbox"/> Video
3	Acquisition Method(s): Check All That Apply <div style="display: flex; justify-content: space-between;"> <div> <input type="checkbox"/> Request for Quotation (RFQ) <input type="checkbox"/> Request for Quotation and Qualification (RFQQ) <input type="checkbox"/> Private Sector Strategic Partnership <input type="checkbox"/> Sole Source </div> <div> <input type="checkbox"/> Request for Proposal (RFP) <input type="checkbox"/> Master Contract <input type="checkbox"/> Inter-Agency Transfer <input type="checkbox"/> Interlocal Coop Purchasing Agency # _____ Contract # _____ </div> </div>		
4	Investment Cost (see definitions on back): \$ _____ System Life Cycle Cost (see definitions on back): \$ _____		
5	Agency Approval (Signature): _____		Date: _____
6	ISB/DIS Approval (Signature): _____		Date: _____
7	(FOR DIS USE ONLY) Comments:		

INSTRUCTIONS

Investment Approval Request For Information Technology Resources

Block 1	
Agency:	Use agency name.
Division:	Agency division designation for area where request originated. If request is for items in more than one division, indicate that it is a multi-divisional request.
Contact:	Name and title of person who could answer questions about the request.
Phone No. and E-Mail:	Phone number and e-mail address of contact person.
Block 2	
Description of Resources:	Provide a brief statement about what the agency wishes to acquire.
Type of Resources:	Check all appropriate box(es).
Telecommunications:	If telecommunications components are part of the acquisition request, check all appropriate box(es).
Block 3	
Acquisition Method(s):	Check the appropriate box.
Block 4	
Investment Cost:	The development and implementation costs required making an IT resource/project fully operational. Investment cost includes all purchases, lease or finance costs, including all costs for hardware, software, networking and telecommunications equipment, installation, training, personal and purchased services, internal agency resources, and all applicable taxes.
System Life Cycle Cost:	The investment cost of the new resources plus projected costs for maintenance, training, operations, and applicable taxes over the expected life of the acquired resource.
Block 5	
Agency Approval:	The agency's appointed designee for approving acquisitions of information technology resources should sign here.
Block 6	
ISB/DIS Approval:	Signature of appropriate ISB or DIS approval authority.
Block 7	
Comments:	May be used by DIS only.